

Listing of Claims:

1. (Currently Amended) A method for organizing a plurality of items which are being tracked in a personal organizer device of the type which is capable of exchanging information with a communications center, comprising the steps of:

maintaining a data list in the personal organizer device, wherein the data list includes all of the plurality of items being tracked, wherein the plurality of items being tracked is limited to a predetermined number of items, and wherein maintaining the data list includes storing information received from the communications center in a memory of the personal organizer device, for each item being tracked;

displaying a first number which indicates a running total of the number of items in the data list, and displaying a second number which indicates the predetermined number of items permitted in the data list;

including in the data list a user defined category tag for each of the plurality of items being tracked;

displaying in a sublist associated with a designated category tag all of those items in the data list which have the designated category tag;

providing at least 2 category tags for at least a first one of the plurality of items being tracked;

displaying the first one of the plurality of items being tracked in a first sublist associated with a first designated category tag;

displaying the first one of the plurality of items being tracked in a second sublist associated with a second designated tag;

receiving input from the user of the personal organizer device which defines the 2 category tags that are provided for the first one of the plurality of items being tracked;
and

controlling the content of a plurality of different sublists based on the user defined category tags.

Claim 2. (Canceled)

3. (Previously Presented) The method of claim 1, wherein a plurality of securities are included among the plurality of items being tracked.

Claim 4. (Canceled)

5. (Previously Presented) The method of claim 1, wherein the personal organizer device is a hand held device.

6 - 8. (canceled)

9. (Original) The method of claim 1, wherein the data maintaining step includes the step of adding new items to the plurality of items being tracked by way of entering an identifier for each new item.

10. (Original) The method of claim 9, wherein the new item adding step includes the step of supplying a category tag for each new item.

11. (Previously Presented) The method of claim 10, wherein the new item adding step includes the step of requiring the user to delete at least a selected one of the plurality of items being tracked whenever the number of items being tracked will exceed the predetermined number because of the addition of the new item.

12. (Original) The method of claim 1, wherein the displaying step includes the step of including selected information about the items being displayed in the sublist which information includes information received from the communications center.

13. (Original) The method of claim 1, wherein the maintaining step includes the step of displaying all of the items in the data list.

14. (Currently Amended) A system for tracking a plurality of items comprising:

a personal organizer device in which information related to each of the plurality of the items being tracked is maintained in a data list, wherein the related information for each of the plurality of items includes a user defined classification tag, and wherein the data list and the user defined classification tags are stored in a memory of the personal organizer device; and

a central communications center which is capable of exchanging with the personal organizer device the related information of the items being tracked;

wherein the personal organizer device operates to store information received from the central communications center for each of the items being tracked, and wherein in the personal organizer device operates to limit the number of items being tracked to a predetermined number, and wherein the personal organizer device displays a first number which indicates a running total of the number of items in the data list, and displays a second number which indicates the predetermined number of items permitted in the data list;

wherein the personal organizer device is capable of displaying a list of all of the plurality of items being tracked by an identifier and an associated user defined classification tag and displaying information received from the central communications center for all of the plurality of items being tracked; and is capable of displaying sublists of the plurality of the items being tracked organized by user defined classification tags along with information about the items received from the central communications center in the displayed sublists;

wherein for at least a first item being tracked, a first user defined classification tag and a second user defined classification tag is provided, and wherein the first item is displayed in a first sublist which is associated with the first user defined classification tag, and the first item is displayed in a second sublist which is associated with the second user defined classification tag; and

wherein the first user defined classification tag and the second user defined classification tag are determined by a user input through the personal organizer device, whereby the user controls which sublists the first item being tracked is displayed with, based on the user defined category tags the user provides for the first item being tracked.

Claim 15. (Canceled)

16. (Previously Presented) The system of claim 14, wherein the personal organizer device is a hand held device.

17. (Original) The system of claim 14, wherein the items being tracked are securities.

Claim 18-37. (canceled)

38. (currently amended) A method for organizing information for a plurality of securities which are being tracked in a hand held computing device of the type which is capable of exchanging information with a communications center, comprising:

maintaining a data list in the hand held computing device, which includes information for all of the plurality of securities being tracked;

limiting the data list to a predetermined number of securities;

displaying a first number which indicates a running total of the number of items in the data list, and displaying a second number which indicates the predetermined number of items permitted in the data list;

receiving information for all of the plurality of securities being tracked from the communication center to the hand held computing device over a wireless link

receiving input from the user of the hand held device which defines at least one category tag for each of the plurality of the securities being tracked;

generating a plurality of different sublists wherein each sublist includes a different subset of the plurality of securities being tracked, wherein each sublist corresponds to a user defined category tag, whereby each security displayed in a particular sublist has a user defined category tag which corresponds to the user defined category tag of the particular sublist;

for at least a first one of the securities being tracked providing at least two user defined category tags; and

displaying in a sublist associated with a designated user defined category tag all of those securities in the data list which have the designated category tag, wherein the

first security which has at least two different user defined category tags, will be displayed in at least two different sublists of securities based on the at least two user defined category tags provided for the first security.

39. (previously presented) The method of claim 38 further comprising:
in response to a user selection displaying a master listing of the securities being tracked wherein the master listing includes securities having different user defined category tags.
40. (previously presented) The method of claim 38 further comprising:
displaying an edit icon and in response to a user selection of the edit icon,
displaying an edit interface which allows a user to delete one of the user defined category tags.
41. (previously presented) The method of claim 38 further comprising:
displaying an edit icon and in response to a user selection of the edit icon,
displaying an edit interface which allows a user to rename a user defined category tag.
42. (previously presented) The method of claim 38 further comprising:
displaying a quick access icon wherein in response to a user selection of the quick access icon, displaying a pull down menu which provides immediate navigation to five user selected screens.